SELF-ASSESSMENT TOOL - PROVIDED BY SUSAN MANGIERO, PHD

Thought Leadership Readiness Review

Is your firm's expertise generating the commercial value it should?

FINANCIAL SERVICES | FINTECH | INVESTMENT MANAGEMENT

Successful companies increasingly recognize intellectual capital as a valuable asset that can contribute to business growth. Combining discipline, creativity, and technology, thought leaders identify available resources, establish a client-centric multimedia narrative strategy, and distribute proprietary content to decision makers they want to reach.

Whether you are just starting a thought leadership initiative or have an established program, it is important to assess strengths and weaknesses, strategic gaps, and alignment across leadership, marketing, sales, and other functions involved in buyer engagement.

Take 10 minutes to answer 12 questions reflecting a 4-pillar framework: Assess, Build, Implement, and Measure. No registration is required. Your answers remain yours unless you choose to share them with me.

Why This Matters

In an increasingly crowded, AI-enabled information environment, the competitive advantage comes not from producing more content, but from offering insights that are original, relevant, credible, and useful.

The question is no longer simply what your firm knows. It is whether that knowledge is helping the right people understand, trust, and choose your firm. This list of 20 ways thought leadership can help is not exhaustive.

Business Growth and Revenue Generation

1. Attract qualified prospects
2. Increase assets under management
3. Shorten complex sales cycles
4. Improve sales conversion
5. Expand into new markets

Competitive and Market Positioning

6. Differentiate from competitors
7. Strengthen brand authority
8. Support new product launches
9. Influence industry conversations
10. Improve consideration before RFPs and pitches

Client Relationships and Trust

11. Strengthen client retention
12. Build credibility, visibility, and reputation
13. Improve communications during uncertainty
14. Expand existing relationships and cross-selling
15. Reduce the risk of misunderstanding

Operational and Strategic Effectiveness

16. Align executives around a coherent narrative
17. Increase communications process efficiency
18. Strengthen narrative governance process
19. Support business and financial strategy
20. Enhance branding, marketing, and sales

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NEXT STEP

Your Complimentary 30-Minute Call

We will discuss your objective, the gap you want to address, and whether a defined project or ongoing support would fit. This is an introductory conversation, with no obligation to engage me.

Four Ways to Work With Me

Narrative Strategy

Selected Assess, Build, Implement, or Measure modules with agreed-upon deliverables and a defined endpoint

Fractional Thought Leadership

Ongoing senior direction and execution across all four pillars on a retainer basis, working to support your in-house team

Ghostwriting for Executives

Collaborative thought leadership strategy and content development for CEOs, Chief Investment Officers, Managing Partners, Founders, Board Members, and other key persons

Speaking & Workshops

Customized keynotes and workshops including thought leadership strategy masterclass, B2B storytelling for RFPs and pitches, managing narrative governance risk, and harnessing AI

About Susan Mangiero, PhD, CFA, CFE, FRM

I draw on experience as an award-winning writer, published book author, Wall Street trader, risk manager, information services start-up CEO, corporate trainer, and expert witness with an MA in Economics, an MBA in Finance, a PhD in Finance, and an MFA in Creative & Professional Writing. I help firms identify, develop, and deploy their intellectual capital to advance commercial objectives.

Turn Your Readiness Review Into Action

Let's discuss your priorities and how strategic support could be useful.

Book a 30-Minute Complimentary Call | **Contact Me**

You can also book an appointment by using the QR code or visiting https://calendly.com/bizwriter/.

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01 Assess

Clarify the objective and find the gaps

Choose one answer per question.

1 Commercial Objective

What commercial objective guides your thought leadership?

☐	**0 points**	No specific objective has been agreed.
☐	**1 point**	A broad goal exists, such as visibility or growth.
☐	**2 points**	A specific objective and intended audience are documented.
☐	**3 points**	The objective, audience, time horizon, and evidence of progress are agreed.

Points _____

2 Buyer Decisions

How well do you understand the questions that influence buyer consideration?

☐	**0 points**	We mainly choose topics based on what we want to say.
☐	**1 point**	We rely on informal assumptions about buyer needs.
☐	**2 points**	We gather questions and objections from clients, marketing, sales, or distribution.
☐	**3 points**	We regularly test priorities with relevant buyers and buying-group roles.

Points _____

3 Intellectual Capital

How systematically do you identify expertise worth developing?

☐	**0 points**	We have no process for finding useful expertise.
☐	**1 point**	Ideas come from a few available contributors.
☐	**2 points**	We identify experts, research, and experience tied to buyer questions.
☐	**3 points**	We assess distinctiveness, supporting evidence, and gaps before prioritizing ideas.

Points _____

ASSESS subtotal _____ / 9

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02 Build

Design a go-to-market thought leadership plan to help buyers evaluate your firm

Choose one answer per question.

4 Distinctiveness

Does your content explain why your firm deserves consideration?

☐	**0 points**	Our message could describe many competing firms.
☐	**1 point**	We assert differences but provide limited support.
☐	**2 points**	We explain relevant differences with examples or evidence.
☐	**3 points**	We test our defensible perspectives that help buyers compare us to competitors.

Points _____

5 Audience Relevance

How well do you adapt complex ideas for the intended decision-makers?

☐	**0 points**	We reuse the same explanation for most audiences.
☐	**1 point**	We adjust tone or length but rarely the underlying explanation.
☐	**2 points**	We tailor detail, examples, terminology, and format to the audience.
☐	**3 points**	We test understanding and usefulness when creating content for our target audiences.

Points _____

6 Executive Authority

Once identified, how deliberately do you develop and communicate executive expertise?

☐	**0 points**	Executive perspectives are largely absent or generic.
☐	**1 point**	Executives contribute occasionally without a clear plan.
☐	**2 points**	We develop substantive perspectives reflecting their expertise and voice.
☐	**3 points**	Executive content has a defined audience, review process, and editorial cadence.

Points _____

BUILD subtotal _____ / 9

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03 Implement

Make the work usable and give it an organizational owner

Choose one answer per question.

7 Ownership and Cadence

Who is accountable for moving thought leadership from idea to publication?

☐	**0 points**	Responsibility is unclear and work frequently stalls.
☐	**1 point**	Someone coordinates publishing, but priorities or capacity are unclear.
☐	**2 points**	An owner, priorities, contributors, and a workable schedule are defined.
☐	**3 points**	Ownership is clear across creation, review, distribution, and follow-through.

Points _____

8 Credibility and Governance

How do you preserve accuracy and credibility during execution?

☐	**0 points**	Accuracy and claims receive no consistent documented review.
☐	**1 point**	Review occurs, but responsibilities or supporting evidence are unclear.
☐	**2 points**	Relevant experts and required reviewers check claims, evidence, and qualifications.
☐	**3 points**	Our governance policies influence documented review, version control, and updates.

Points _____

9 Reach and Commercial Use

How do you put content in front of relevant buyers and equip your team to use it?

☐	**0 points**	We publish with no targeted external distribution or internal use.
☐	**1 point**	We distribute broadly, with limited targeting or team guidance.
☐	**2 points**	We equip client managers, distribution, product development, and sales with guidance.
☐	**3 points**	We equip teams for targeted distribution and refine channels using buyer feedback.

Points _____

IMPLEMENT subtotal _____ / 9

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04 Measure

Gather evidence and use it to improve the agreed-upon thought leadership strategy

Choose one answer per question.

10 Relevant Engagement

What do you know about who engages and whether your content helps?

☐	**0 points**	We do not track engagement or gather feedback.
☐	**1 point**	We mainly report views, impressions, or follower counts.
☐	**2 points**	We track engagement from relevant audiences and gather qualitative feedback.
☐	**3 points**	We regularly analyze qualitative and quantitative engagement performance data.

Points _____

11 Commercial Contribution

How do you assess thought leadership's contribution to commercial objectives?

☐	**0 points**	We make no connection between content and commercial progress.
☐	**1 point**	We infer commercial value mainly from activity or reach.
☐	**2 points**	We record content use, qualified inquiries, and relevant buyer conversations.
☐	**3 points**	We assess qualified opportunities and sales progress against defined objectives, while considering other influences.

Points _____

12 Learning and Adjustment

How does measurement change your priorities or execution?

☐	**0 points**	We rarely review what the program is accomplishing.
☐	**1 point**	We review activity, but decisions seldom change.
☐	**2 points**	We regularly review evidence and adjust topics, formats, distribution, or execution.
☐	**3 points**	We document what to continue, change, or stop and use the findings to revise our thought leadership strategy, editorial calendar, and distribution action plan.

Points _____

MEASURE subtotal _____ / 9

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Interpreting Your Score

Turn your answers into practical action

Complete all 12 questions to calculate your overall readiness score. Match your total score to one of the categories shown in the matrix below. Remember these are descriptive categories and not statistically validated benchmarks. Identify one action you think could improve differentiation, buyer engagement, trust, or commercial effectiveness.

Your Score Summary

Pillar	Subtotal
01 Assess	____ / 9
02 Build	____ / 9
03 Implement	____ / 9
04 Measure	____ / 9
Total	____ / 36

What Your Score Means

Point Range	Category	Description
0-9	Foundational	Your organization may lack a clear or consistent approach to thought leadership. Start by defining objectives, target audiences, and responsibilities.
10-18	Developing	Some elements are in place, but gaps in strategy, execution, or measurement may be limiting effectiveness. Prioritize the weakest areas.
19-27	Established	Your organization has meaningful capabilities, but opportunities remain to strengthen differentiation, consistency, and commercial impact.
28-36	Advanced	Your responses suggest a well-developed approach. Focus on refining performance, adapting to changing buyer needs, and demonstrating commercial contribution.

If you are ready to turn your results into action, schedule a complimentary 30-minute call to discuss your firm's thought leadership priorities and potential next steps.

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Disclaimer: This tool is an informal, educational self-assessment intended for leadership, distribution, investor relations, marketing, product development, and sales professionals in the B2B financial services, fintech, and investment management sectors.

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